

Application Number 09/628,479  
Responsive to Office Action mailed March 1, 2004

**AMENDMENTS TO THE CLAIMS**

This listing of claims will replace all prior versions, and listings, of claims in the application.

**Listing of Claims:**

Claim 1 (Currently Amended): A computer-based method comprising:  
capturing with a server forecast data from a set of contributors according to a multi-level organizational model;  
capturing with the server target data from a set of analysts;  
executing software on the server to perform a reconciliation process to  
reconcile[ing] the target data and the forecast data in accordance with the organizational model by:  
selecting one or more of the contributors associated with a current level of  
the organizational model,  
presenting the target data and the forecast data to the selected contributors,  
receiving with the server review information from the selected  
contributors, wherein the review information indicates whether the selected  
contributors accept or reject the forecast data in view of the captured target data,  
automatically updating the current level with the server based upon the  
review information,  
receiving with the server updated forecast data based on the updated  
current level when at least one of the selected contributors rejects the forecast  
data, and  
repeating the reconciliation process with the server until the current level  
reaches a pre-defined level of the model and the review information indicates that  
the selected contributors associated with that pre-defined level accept the forecast  
data; and  
generating a budget report based on the reconciled forecast data.

Claim 2 (Canceled).

Application Number 09/628,479  
Responsive to Office Action mailed March 1, 2004

**Claim 3 (Currently Amended):** The method of claim 1, wherein capturing forecast data according to the model comprises receiving the forecast data from a remote computing device over a packet-based network.

**Claim 4 (Currently Amended):** The method of claim 3, wherein capturing the forecast data comprises communicating a template and a calculation engine to the remote computing device, wherein the template includes a data cube for storing the target data and the forecast data.

**Claim 5 (Original):** The method of claim 4, wherein the template and the calculation engine are Active X components capable of receiving data and locally processing data on the computing device.

**Claim 6 (Previously Presented):** The method of claim 1, wherein the model includes a plurality of hierarchically arranged nodes, and each node corresponds to one or more of the contributors.

**Claim 7 (Canceled).**

**Claim 8 (Currently Amended):** The method of claim [[2]]1, wherein generating a budget report comprises generating a budget report based on the forecast data when the current level reaches a highest level of the model.

**Claim 9 (Currently Amended):** The method of claim [[2]]1, wherein updating the current level comprises:

incrementing the current level when all of the selected contributors accept the forecast data; and

decrementing the current level when at least one of the selected contributors rejects the forecast data.

Application Number 09/628,479  
Responsive to Office Action mailed March 1, 2004

Claim 10 (Currently Amended): A budgeting system for an organization comprising:

a database configured to store data defining a set of contributors, a set of analysts, and a multi-level model of an organization, wherein the model has a plurality of hierarchically arranged nodes, each node corresponding to at least one of the contributors; and

a server coupled to the database,

wherein the server accesses the data within the database, and is configured to capture forecast data from the contributors and target data from the analysts, and to reconcile the target data and the forecast data in accordance with the model

wherein the server selectively presents the forecast data and the target data to a subset of the contributors associated with a current level of the model, and increments the current level when all of the contributors associated with nodes of the current level accept the forecast data and decrements the current level when at least one of the contributors associated with the nodes of the current level rejects the forecast data, and

wherein the server generates a budget report based on the forecast data when the current level reaches pre-defined level within the model.

Claim 11 (Previously Presented): The system of claim 10 further comprising:

a computing device communicatively coupled to the server via a packet-based network; and

a calculation engine executing in an operating environment provided by the computing device, wherein the calculation engine manipulates a data cube in response to the target data and the forecast data.

Claim 12 (Original): The system of claim 11, wherein the template and the calculation engine are Active X components capable of receiving data and locally processing data on the computing device.

Application Number 09/628,479  
Responsive to Office Action mailed March 1, 2004

Claim 13 (Currently Amended): The system of claim 10, wherein the server:

~~selects from the database one or more of the contributors associated with [a] the current level of the model;~~  
~~presents the target data and the forecast data to the selected contributors;~~  
~~receives review information from the selected contributors for the current level, wherein the review information indicates whether the selected contributors accept[s] or reject[s] the forecast data in view of the target data; and~~  
~~automatically selectively increments or decrements updates the current level of the organizational hierarchy based upon the review information; and~~  
~~upon decrementing the current level to a lower level, presents an interface to receive revised forecast data from at least one contributor associated with the lower level.~~

Claim 14 (Canceled).

Claim 15 (Currently Amended): A computer-based method for generating a budget by executing software on a computer, the method comprising:

storing a model of an organization, wherein the model has a plurality of nodes hierarchically arranged into a number of levels;  
associating a contributor with each node of the model hierarchy;  
capturing with a computer forecast data from a contributor associated with a node within a lower level of the model hierarchy;  
capturing with the computer target data from a set of analysts;  
selectively presenting with the computer the forecast data and the target data to a subset of the contributors for reconciliation based on a current level of the model;  
receiving review information with the computer from the subset of the contributors selected based on the current level;  
updating the current level with the computer according to review information; and  
generating with the computer a budget for the organization based on the forecast data when the forecast data is approved by a contributor associated with a root node within a highest level of the model.

Application Number 09/628,479  
Responsive to Office Action mailed March 1, 2004

**Claim 16 (Previously Presented):** The method of claim 15, wherein updating the current level includes incrementing the current level when the review information indicates an acceptance of the forecast data and decrementing the current level when the review information indicates a rejection of the forecast data.

**Claim 17 (Cancelled).**

**Claim 18 (Original):** The method of claim 15, wherein capturing forecast data comprises receiving the forecast data from a remote computing device over a packet-based network.

**Claim 19 (Original):** The method of claim 18, wherein capturing the forecast data comprises communicating a template and a calculation engine to the computing device, wherein the template includes a data cube for storing the target data and the forecast data.

**Claim 20 (Previously Presented):** A computer-readable medium comprising:

a set of data structures to store data that defines an organizational model that controls a network-based budget planning system for reconciliation of target data and forecast data for an organization, wherein the model includes a plurality of nodes that are hierarchically arranged into a number of levels; and

a set of data structures to store data that defines a number of contributors, wherein each node of the model is associated with a contributor to control the selective capture of review information from the contributors by the network-based system during the reconciliation.

**Claim 21 (Original):** The computer-readable medium of claim 20, wherein contributors associated with nodes of a lowest level of the hierarchy the contributors are individuals responsible for entering forecast data for the organization, and further wherein contributors associated with nodes at higher levels of the hierarchy are responsible for reviewing the forecast data.

Application Number 09/628,479  
Responsive to Office Action mailed March 1, 2004

**Claim 22 (Previously Presented)** The computer-readable medium of claim 20 and further comprising template data structures defining a set of templates to store the forecast data and the target data.

**Claim 23 (Original):** The computer-readable medium of claim 22, wherein the template data structures comprises a data cube.

**Claim 24 (Original):** The computer-readable medium of claim 20, wherein each node stores data defining an owner of the node.

**Claim 25 (Original):** The computer-readable medium of claim 20, wherein a set of the nodes stores data defining a reviewer for the node.

**Claim 26 (Previously Presented):** The computer-readable medium of claim 22, wherein each node is associated with one or more of the templates.

**Claim 27 (Original):** The computer-readable medium of claim 20, wherein each node stores data defining a state of the node.

**Claim 28 (Previously Presented):** The computer-readable medium of claim 27, wherein the states include NOT-STARTED, LOCKED AND WORK-IN-PROGRESS.

**Claim 29 (Previously Presented):** The computer-readable medium of claim 27, wherein the states further include READY and INCOMPLETE.

**Claim 30 (Original):** The computer-readable medium of claim 20 and further comprising a set of data structures to store data that defines a number of analysts for inputting organizational targets.

Application Number 09/628,479  
Responsive to Office Action mailed March 1, 2004

Claim 31 (Currently Amended): A system comprising:

means for storing a definition of a hierarchical model of an organization;

means for receiving organizational target data and forecast data according to the model; and

means for reconciling the organization target data and forecast data according to the model; and

means for generating an electronic budget based on the reconciled target data and forecast data.

Claim 32 (Original): The system of claim 31 comprising means for capturing the organizational target data and the forecast data.

Claim 33 (Currently Amended): The system of claim 31, wherein the reconciling means includes:

means for receiving review input; and

means for propagating the forecast data up and down the organization in accordance with the hierarchical model based on the review input-hierarchy.